

Daily Market Report

4 April 2023

JSE

JSE All-Share Index increased by 0.68% and closed at 76,614.96 points on Monday, as the Resources and Financial sectors recorded gains.

BRVM

BRVM composite Index decreased by 0.28% and closed at 200.04 points on Monday, with Filitisac Côte d'Ivoire and Uniwax Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index inched down by 0.09% to close at 54,184.34 points on Monday, as the Oil & Gas, Consumer Goods and Banking sectors recorded losses.

EGX

EGX 30 Index climbed by 2.17% and closed at 17,056.89 points on Monday, as the market gained LE 21 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.98% to close at 795.39 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.68%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.28%
NGX Nigerian Stock Exchange	▼	0.09%
EGX Egyptian Stock Exchange	▲	2.17%
ESG Casablanca Stock Exchange	▲	0.98%

African Markets

Nigeria: NGX 30 Index was down by 0.15% to close at 1930.44 points on Monday. International Breweries and Ecobank were the top losers.

Egypt: EGX 30 Index climbed by 2.17% and closed at 17,056.89 points on Monday, as the market gained LE 21 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.60% and closed at 1,631.74 points on Monday. Diamond Trust Bank Limited and Kengen Limited were the top gainers.

South Africa: JSE Top 40 Index increased by 0.65% and closed at 70,958.75 points on Monday as the Resources and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.83
INTERBANK RATES	
OPR	17.38 ▼
Overnight	17.88 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.75% to close at 9,501.15 points on Monday, as gains in the Real Estate, Financial and Energy sectors led shares higher. MSCI UAE climbed by 2.51 % to close at 382.13 points.

Vietnam: VN-30 Index climbed by 1.32% to close at 1,087.89 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.26% to close at 648.36 points.

Saudi Arabia: Tadawul All Share Index climbed by 1.60% to close at 10,806.89 points on Monday, as gains in the Transportation, Software & Services, and Consumer Durables & Apparel sectors led shares higher. MSCI Saudi Arabia surged by 2.04% and closed at 1,471.61 points.

India: Nifty 50 Index increased by 0.22% to close at 17,398.05 points on Monday, as gains in the Media, Bank and Auto sectors led shares higher. MSCI India increased by 0.21% to close at 1,924.25 points.

News

Nigeria:

Nigeria earned N1.8tn from oil export in March – Report
FG approves 173 loan apps, bars illegal online banks
FCMB Group's revenue hits N283billion

Kenya:

State to share fibre optic project with private sector
Equities rise to record Sh32bn on EABL deal
M-Shwari retains 7.5pc rate as competitors increase fee

Abu Dhabi:

Abu Dhabi entities set up fund for business tourism
Dubai freezone: Record 708 companies join DMCC in Q1
DFM-listed Amanat to launch healthcare company

Saudi Arabia:

OPEC+ production cuts likely to lift oil prices above \$100 a barrel
Riyadh records lowest unemployment rate in Saudi Arabia
Saudi Electricity dual-tranche sukuk draw over \$12bn in demand

Egypt:

Egypt to invest EGP 76B in Giza in FY2022/23
Trade exchange between Egypt, Saudi Arabia grows 13.5% in 2022
Ezz Steel's profits jump to EGP 6.6bn in 2022

South Africa:

SA factory activity slumps further in March on power cuts
Sars collects R1.68trn in taxes in 2022/23 fiscal year
Eskom exempt from disclosing irregular & fruitless expense til 2025

India:

Manufacturing activity in March at 3-month high
Net direct tax collections for FY 2022-23 exceed estimates by ~17%
IndianOil notches record capex at Rs 35,205 crore

Vietnam:

Tax revenue reaches over 19.7 billion USD in Q1
HCM City's industrial production index down 0.9% in Q1
Ministry proposes lower tax rate for small, micro-enterprises

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,501.15	0.8%	0.8%	0.8%	-7.0%	AED/USD	3.67	0.0%	0.0%
Egypt	17,056.89	2.2%	3.9%	3.9%	16.8%	EGP/USD	30.90	0.4%	25.1%
India	17,398.05	0.2%	0.2%	0.2%	-3.9%	INR/USD	82.22	0.0%	-0.6%
Kenya	1,631.74	0.6%	0.6%	0.6%	-2.6%	KES/USD	132.75	0.2%	7.5%
Nigeria	1,930.44	-0.1%	-0.1%	-0.1%	4.8%	NGN/USD	460.33	-0.9%	2.7%
Saudi Arabia	10,806.89	1.6%	2.0%	2.0%	3.1%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,958.75	0.7%	0.7%	0.7%	6.0%	ZAR/USD	17.85	0.4%	4.8%
Vietnam	1,087.89	1.3%	1.3%	1.3%	8.2%	VND/USD	23,470.00	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	485.40	0.3%	0.34%	0.3%	2.8%	Brent Crude (\$)	84.93	6.5%	-1.1%
MSCI Frontier 100	1,114.96	0.5%	0.5%	0.5%	2.2%	Gold (\$)	1,983.90	0.8%	8.6%
MSCI Emerging	989.19	-0.1%	-0.1%	-0.1%	3.4%	Copper (\$)	8,917.00	-0.8%	6.5%
MSCI World (USD)	2,803.63	0.4%	0.4%	0.4%	7.7%	Coffee (\$)	165.37	0.2%	5.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	2.09	10.0%	4.5%	25.18	UACN	8.60	-9.9%	-16.1%	13.56
United Capital PLC	11.55	3.1%	-17.5%	37.28	International Breweries	4.20	-6.7%	-10.6%	12.14
UBA	8.40	0.6%	10.5%	224.11	P Z Cussons	10.80	-3.6%	-4.8%	13.38
Fidelity	5.36	0.2%	23.2%	426.80	Ecobank	10.90	-3.1%	2.8%	5.27
					Transnational Corporation	1.38	-0.7%	22.1%	39.87
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	4.15	4.15	0.0%	4.35	Cap	17.90	15.25	17.4%	0.81
Wema	4.00	4.00	0.0%	0.48	Custodian	5.65	4.55	24.2%	1.43
Total	218.80	218.80	0.0%	70.41	Unilever	13.50	10.50	28.6%	49.53
Seplat Petroleum	1150.00	1150.00	0.0%	117.20	Sterling	1.54	1.13	36.3%	1.09
P Z Cussons	10.80	10.80	0.0%	13.38	Guaranty	25.40	18.00	41.1%	265.49

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sudatel Telecommunications Group Company Limited	0.45	11.8%	-99.9%	2.07	FOODCO NATIONAL FOODSTUFF PrJSC	2.25	-10.0%	-99.5%	0.00
OOREDOO	9.98	10.9%	-97.6%	0.00	GHITHA HOLDING	35.14	-9.9%	-91.4%	3.89
Gulf Pharmaceutical Industries	0.99	8.5%	-99.8%	0.01	National Marine Dredging Co.	20.30	-8.4%	-95.0%	37.99
Aram Group	1.68	7.0%	-99.6%	0.01	HILY HOLDING PJSC	4.00	-6.3%	-99.0%	0.00
Abu Dhabi Islamic Bank	10.48	5.0%	-97.4%	40.56	Abu Dhabi National Energy Company	3.35	-4.0%	-99.2%	10.18
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Al Fujairah National Insurance Co.	210.00	210.00	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	The National Investor PRJSC	0.45	0.45	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	Union Insurance Co.	0.50	0.50	0.0%	0.00
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
GB AUTO	5.25	9.4%	-2.1%	94.84	Taaleem Management Services	3.21	-3.0%	-19.8%	3.00
QALA For Financial Investments	2.06	8.8%	-1.0%	134.12	Cairo For Investment And Real Estate Development	10.36	-1.5%	-20.3%	14.13
Abou Kir Fertilizers	47.52	6.8%	22.5%	84.68	Juhayna Food Industries	11.15	-0.4%	13.9%	9.22
Ibsina Pharma	1.48	6.1%	-31.3%	6.56	Oriental Weavers	14.38	-0.3%	38.3%	38.56
Egyptian Financial Group	17.80	5.3%	-0.4%	365.75	Edita Food Industries S.A.E	15.00	0.1%	-5.4%	16.88
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Telecom Egypt	25.24	25.24	0.0%	22.36	Housing & Development Bank	9.70	9.70	0.0%	75.00
Sidi Kerir Petrochemicals	21.10	21.10	0.0%	99.15	Taaleem Management Services	3.21	2.72	18.0%	3.00
Oriental Weavers	14.38	14.38	0.0%	38.56	Cleopatra Hospital Co.	4.57	3.81	19.9%	8.28
Orascom Construction	100.98	100.98	0.0%	24.87	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.09	1.62	29.0%	22.45
Misr Fertilizers Production Co.	158.96	158.96	0.0%	17.56	Ibsina Pharma	1.48	1.10	34.7%	6.56

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	2429.00	3.5%	-11.3%	1903.493	Bharat Petroleum	330.25	-4.1%	-0.1%	3131.55
Coal India	220.30	3.1%	-2.1%	1691.86	Adani Enterprises Limited	1718.00	-1.9%	-55.5%	5918.46
Bajaj Auto	3989.90	2.7%	10.3%	1974.15	Apollo Hospitals Enterprise Ltd	4233.00	-1.8%	-5.5%	2101.42
Maruti Suzuki India	8508.00	2.6%	1.4%	5332.38	Infosys	1410.00	-1.3%	-6.5%	7406.14
Divi's Laboratories Limited	2880.00	2.0%	-15.6%	647.47	ITC	379.20	-1.1%	14.4%	2684.54
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Dr Reddys Lab	4663.35	4682.00	-0.4%	1393.43	Wipro	368.20	355.00	3.7%	743.94
Ultratech Cement	7643.00	7737.00	-1.2%	2759.08	Infosys	1410.00	1355.00	4.1%	7406.14
NTPC	177.90	182.95	-2.8%	1614.38	Tata Consumer products ltd.	716.95	686.60	4.4%	570.15
Bajaj Auto	3989.90	4131.75	-3.4%	1974.15	Cipla	891.15	852.00	4.6%	2341.03
Larsen & Toubro	2169.00	2297.65	-5.6%	2673.28	Divi's Laboratories Limited	2880.00	2730.00	5.5%	647.47

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	53.20	3.8%	6.4%	0.11	WPP Scangroup Plc	2.80	-2.8%	-7.0%	0.00
Kengen Limited	2.28	3.6%	-29.2%	0.58	NCBA Group Plc	36.35	-1.0%	-7.6%	0.49
Total Kenya Ltd	22.00	2.3%	-7.8%	0.01	British American Tobacco Kenya Ltd	462.00	-0.4%	0.4%	0.05
KCB Group Plc	36.20	2.0%	-5.0%	1.08	Nairobi Securities Exchange Plc	6.22	-0.3%	-8.3%	0.12
Bamburi Cement Limited	28.50	1.6%	-9.5%	0.04	Centum Investment Company Plc	8.94	-0.2%	6.9%	0.07
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
Standard Chartered Bank Kenya Ltd	170.00	170.00	0.0%	0.73	WPP Scangroup Plc	2.80	2.80	0.0%	0.00
Absa Bank Kenya	12.90	12.95	-0.4%	0.40	Nairobi Securities Exchange Plc	6.22	6.02	3.3%	0.12
Stanbic Holdings	110.00	114.00	-3.5%	1.12	Kengen Limited	2.28	2.15	6.0%	0.58
The Cooperative Bank of Kenya Ltd	13.15	14.00	-6.1%	7.02	Bamburi Cement Limited	28.50	26.75	6.5%	0.04
NCBA Group Plc	36.35	40.00	-9.1%	0.49	Safaricom Plc	18.15	16.35	11.0%	62.23

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tihama Advertising and Public Relations Co.	18.22	9.9%	-72.8%	0.08	Gulf Insurance Group	27.30	-3.7%	11.0%	12.14
Saudi Re for Cooperative Reinsurance Co.	16.12	6.8%	17.7%	16.77	Ash-Sharqiyah Development Co.	59.50	-3.6%	20.2%	16.13
Riyadh Bank	31.25	5.9%	-1.7%	48.84	National Shipping Company of Saudi Arabia	31.20	-3.4%	5.8%	45.20
Banque Saudi Fransi	38.35	5.2%	-5.5%	38.10	Dar Alarkan Real Estate Development Co.	15.02	-2.6%	28.8%	82.10
Arab National Bank	27.05	4.8%	-15.6%	61.14	Gulf Union Alahlia	9.41	-2.5%	10.4%	2.22
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Power & Water Utility Co for Jubail & Yanbu	55.90	55.90	0.0%	120.16	Al Alamiya for Coop Insurance Co.	12.50	12.50	0.0%	1.38
Riyadh Cables Group Co.	53.30	53.30	0.0%	11.33	Alkhabeer REIT Fund	6.71	6.71	0.0%	3.81
Alamar Foods Co.	142.00	142.00	0.0%	8.07	Allied Cooperative Insurance Group	11.64	11.64	0.0%	1.44
Nahdi Medical Co.	185.80	185.80	0.0%	28.01	Amana Cooperative Insurance Co.	9.83	9.83	0.0%	5.06
Scientific and Medical Equipment House Co.	68.40	68.40	0.0%	17.93	CHUBB Arabia Coop Insurance Co.	17.42	17.42	0.0%	1.24

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Ltd	25362.00	5.7%	-5.9%	42100.92	Glencore	10016.00	-1.6%	-12.2%	106169.60
Reinet Investments SCA	37394.00	2.4%	14.2%	9019.06	BHP Group Ltd	55773.00	0.9%	5.9%	47331.20
Exxaro Resources Ltd	19098.00	2.4%	-12.1%	17570.16	Aspen Pharmacare Holdings Ltd	18204.00	-0.6%	33.5%	13661.92
Capitec Bank Holdings Ltd	172671.00	2.3%	20.9%	31911.33	Naspers Ltd	328335.00	-0.3%	16.3%	126684.78
Woolworths Holdings Ltd	6499.00	1.7%	-2.2%	29765.42	Sibanye Stillwater Ltd	3656.00	-0.2%	-18.2%	45626.88
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn R)
Anheuser-Busch InBev SA/NV	118756.00	118901.00	-0.1%	60499.06	Anglo American Platinum Ltd	95787.00	94753.00	1.1%	17950.48
Bid Corp Ltd	39993.00	41225.00	-3.0%	27724.75	Clicks Group Ltd	25815.00	25227.00	2.3%	12307.30
Reinet Investments SCA	37394.00	38536.00	-3.0%	9019.06	Exxaro Resources Ltd	19098.00	17820.00	7.2%	17570.16
Bidvest Group Ltd	25541.00	27230.00	-6.2%	14596.17	Mr Price Group Ltd	14610.00	13450.00	8.6%	7478.86
NEPI Rockcastle NV	10349.00	11925.00	-13.2%	21629.41	Sasol Ltd	25362.00	22610.00	12.2%	42100.92

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Phat Dat Real Estate Development Corp	13250.00	6.0%	-2.6%	108.952,81	Vietjet Aviation	102600.00	-2.4%	-6.3%	31.071,52
Vingroup	58000.00	5.5%	7.8%	279.239,00	Saigon Beer Alcohol Beverage Corp.	181000.00	-2.0%	8.4%	17.148,22
Techcombank	29300.00	3.4%	13.3%	362.454,05	Masan Group Corp	76800.00	-1.3%	-17.4%	127.671,12
Vietnam Rubber Group	15950.00	2.9%	15.6%	59.895,51					
Vietnam JSC Bank	29950.00	2.6%	9.9%	110.879,15					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
Vietcombank	92800.00	96000.00	-3.3%	67.698,59	Vietnam Rubber Group JSC	15950.00	15950.00	0.0%	59.895,51
Bank for Inv. and Devp	45900.00	49950.00	-8.1%	58.254,38	Mobile World Inv. Corp	39000.00	39000.00	0.0%	82.191,15
Saigon Beer Alcohol Beverage Corp.	181000.00	197900.00	-8.5%	17.148,22	No Va Land Invest	12850.00	12850.00	0.0%	425.096,11
Asia Commercial JS Bank	25250.00	29080.00	-13.2%	250.587,36	Phat Dat Real Estate Development Corp	13250.00	13250.00	0.0%	108.952,81
Vinamilk	74400.00	87004.15	-14.5%	63.350,51	Vietjet Aviation	102600.00	102600.00	0.0%	31.071,52

Email: research@fsdhgroup.com • www.fsdhgroup.com

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